

General Management Assistance Contract (GMAC) **ANNUAL REPORT**

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Prepared by:



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1. Introduction

This is the third Annual Report of the General Management Assistance Contract (GMAC) between the U.S. Agency for International Development Mission to South Africa (USAID/South Africa) and Mega-Tech, Inc. (MTI), which was signed on August 31, 2001. GMAC is a cost-plus-fixed-fee term contract that provides administrative, management, and logistical support to USAID/South Africa's Office of Housing and Urban Environment (SO6), Office of Economic Growth and Employment (SO5), and Regional Urban Development Office for Africa (RUDO/Africa). Through this \$17.86¹ million contract, MTI provides a broad range of services requested by these offices to support USAID programming in the areas of technical assistance, grants management, training, and monitoring/evaluation through September 30, 2005. This report covers GMAC progress from October 1, 2003 through September 30, 2004.

2. Programming

GMAC programming is organized on a task order system in which GMAC's USAID Cognizant Technical Officer (CTO) issues written requests for specific services on an as-needed basis; outlines the scope of work to be undertaken through individual task orders; identifies, in certain cases, potential sources of the services requested; and defines the maximum budget and applicable USAID funding sources for the requested services. The GMAC task ordering system is the primary tool for managing program work under the contract and has been instrumental in ensuring smooth contract-related communications and reporting between USAID and MTI.

2.1 General Overview

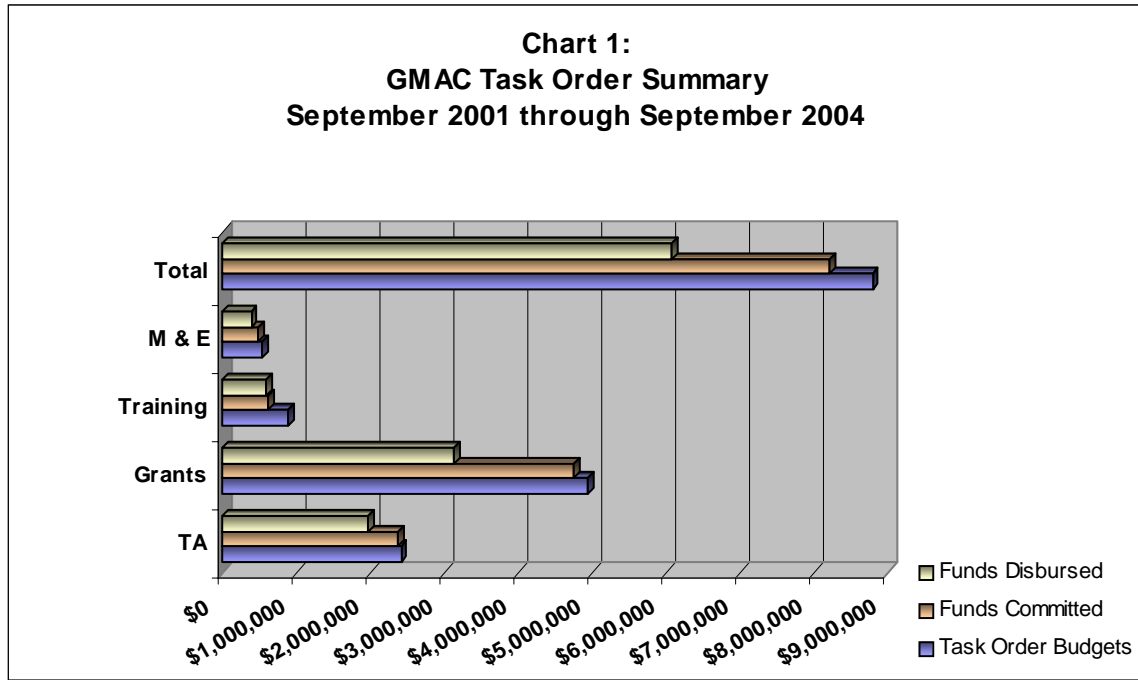
2.1.1 Activities

Since the start of the contract, we have acted on 129² USAID task orders with budgets totaling \$8.80 million. The task ordered activities were distributed by program component as shown in Chart 1 below and ranged in value individually from \$400 to \$250,000. Through 9/30/04, we have entered into contractual commitments totaling \$8.22 million and disbursed \$6.09 million for USAID-supported technical assistance, grants management, training, and monitoring/evaluation activities.³ The Task Order Status Report, found as Attachment C, provides details of the types, numbers, values, and current status of all GMAC task orders issued to date.

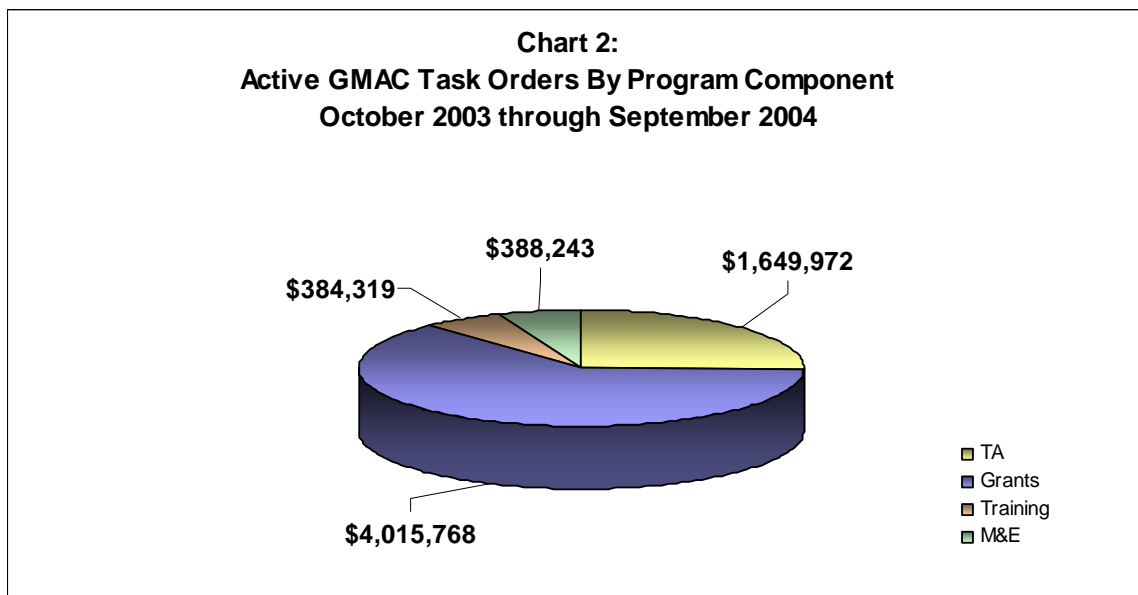
¹ As amended through GMAC Contract Modification No. 7 on 9/30/03. The contract has \$14,574,790.40 in currently obligated USAID funding.

² This excludes nine task orders that were issued by USAID and then subsequently cancelled.

³ Value Added Tax (VAT)-exclusive figures are used throughout the Annual Report text for program-related expenditures.



During 2003/2004, 71 task orders with budgets totaling \$6.44 million were active and at various stages of development, implementation, or closeout. This total included 27 task orders newly received from USAID this year and 44 more long-term task ordered activities carried over from previous reporting periods. The distribution of active task orders by program component is shown in Chart 2 below. New contractual commitments totaling \$2.66 million were entered into this year for task ordered subcontracts, grants, and participant training activities, while program-related disbursements during the course of the year reached \$2.08 million⁴. A breakdown of funding commitments and disbursements this year by program component is shown in Table 1 on the next page.



⁴This includes continuing disbursements on subcontracts and subgrants signed during the previous annual reporting period.

Table 1:
GMAC Task Order Financial Summary

	TA ²	Grants	Training	M&E	Total
2001/2002					
Task Order Amount ¹	\$985,357	\$1,758,889	\$482,492	\$156,460	\$3,383,198
Funds Committed	\$635,438	\$1,586,889	\$459,026	\$91,527	\$2,772,880
Funds Disbursed	\$209,561	\$1,044,051	\$388,411	\$8,766	\$1,650,790
2002/2003					
Task Order Amount	\$1,426,574	\$1,022,837	\$171,033	\$239,170	\$2,859,614
Funds Committed	\$1,385,158	\$1,044,837	\$116,244	\$238,670	\$2,784,909
Funds Disbursed	\$1,113,861	\$962,869	\$116,410	\$162,947	\$2,356,086
2003/2004					
Task Order Amount	\$7,884	\$2,169,159	\$232,600	\$146,233	\$2,555,876
Funds Committed	\$358,916	\$2,119,159	\$34,423	\$150,986	\$2,663,484
Funds Disbursed	\$652,514	\$1,119,284	\$91,993	\$216,159	\$2,079,949
TOTAL					
Task Order Amount	\$2,419,815	\$4,950,885	\$886,125	\$541,863	\$8,798,688
Funds Committed	\$2,379,512	\$4,750,885	\$609,693	\$481,183	\$8,221,273
Funds Disbursed	\$1,975,937	\$3,126,204	\$596,813	\$387,872	\$6,086,826

¹ Unexpended Task Order budget amounts are returned to USAID following the close out of Task Ordered activities; thus the amounts shown here are lower than the value of original Task Orders issued.

² Disbursed amount include approximately \$52,000 for USAID-authorized TA not attributable to task orders.

2.1.2 General Trends and Issues

Several key features characterized the overall GMAC program portfolio during its second year:

- Both in terms of the total number and value of task ordered activities, there has been a continuing orientation to grants administration and, to a lesser extent, technical assistance activities. Nearly 70 percent of all active task orders and 88 percent of their budgets this year were for grant and technical assistance activities. By comparison, GMAC training and monitoring/evaluation activities were generally fewer and of lower value.
- The positive overall trend toward higher value task ordered activities has continued. The average value of all active GMAC task orders increased from \$73,801 to \$90,680, or by 23 percent, between GMAC's second and third years.
- However, there has been a net decline in the total number and value of new task orders received from USAID this year as a result of shifting programming priorities of our USAID client offices and general budgetary cuts within USAID. In particular, this year has witnessed a drop in both the number (34 vs. 12) and total value (\$2.61 million vs. \$0.86 million) of new task ordered activities requested by SO6, which has increasingly used MTI field office staff resources for services outside of the GMAC task ordering system and for direct administrative support of SO6 operations. The majority of new task orders received this year were for SO5-sponsored activities.
- Continuing financial management challenges have been posed for USAID, MTI, and GMAC subcontractors and grantees alike by extreme exchange rate fluctuations. We have worked closely with USAID to plan realistic budgets for task ordered activities that anticipate a downward trend in the value of the Dollar against the Rand and with our subcontractors and grantees to cut activity costs.
- As we enter the fourth year of the GMAC contract, there is an urgent short-term need to identify and initiate in collaboration with USAID all task ordered activities to be undertaken through the balance of the contract. The contract is currently scheduled to expire on September 30, 2005, and

all current and planned task ordered activities should be complete by July 2005 in order to allow for GMAC close out, unless USAID exercises its option to extend the contract.

2.2 **Technical Assistance**

2.2.1 **Activities**

Since contract inception, we have received a total of 41⁵ task orders under the technical assistance (TA) component with maximum authorized budgets totaling \$2.42 million and ranging in value individually from \$800 to \$250,000. Our subcontracting actions to date for TA have committed \$2.38 million (or 99 percent of the maximum authorized TA task order budget amounts), of which \$1.98 million (or 89 percent of the MTI contracted amount) has been disbursed. All TA task orders received from USAID to date have been acted on by MTI and are at various stages of implementation or closeout, as detailed in Attachment C.

During the 2003/2004 annual reporting period, 20 TA task orders were active, including 2 that were newly received during the course of the year as well as continuing work on 18 other more long-term activities initiated last year. Disbursements this year for TA activities declined from \$1.11 million to \$0.65 million, largely as a result of the sharp 86 percent drop in the number of new TA activities requested by SO6, historically our primary USAID client office.

2.2.2 **Technical Highlights**

Noteworthy activities under the technical assistance component this year have included:

National Housing Policy and Research Agenda (Task Order 43 TA) – SO6 has maintained a close working relationship with the South African Department of Housing since the early 1990s and has provided extensive support through GMAC to the Government's national housing program. At SO6's request in 2002, MTI assisted the Department to organize a nationwide series of 14 workshops with national, provincial, municipal, and NGO stakeholders to obtain feedback on the strengths and weaknesses of the national housing program during the previous decade. Subsequently, in 2003, MTI provided the services of six separate South African and international consulting teams to assess the impact of the national housing program in the first decade since government transformation and identify new housing policy and research directions to be pursued in the coming ten years. Finally, in 2004, an MTI subcontractor assisted the Department to synthesize the results of this effort in a new national Housing Policy and Research Agenda, which was presented at the National Housing Summit in early 2004 and contributed to a new national housing policy now under review by Government.

Cape Town Integrated Waste Management Plan (Task Order 37 TA) – This technical assistance project is the latest in a series of SO6 activities undertaken with the City of Cape Town to strengthen internal transformation efforts and improve urban service delivery. The city is facing rapidly escalating solid waste volumes, landfill airspace is in short supply, and disposal is becoming more and more expensive as a result of increasing environmental and other legislative requirements. It is thus no surprise that waste minimization, recycling, and improved waste education have emerged as the primary strategies of this pilot study, which comes in advance of national requirements set to come on line in 2005. The project has been one of MTI's most challenging technical assistance efforts to date, involving a year-long process managed jointly by MTI and the Cape Town Solid Waste Department, supported by dozens of professionals from a consortium of 10 firms engaged by MTI and a large number of both city and provincial officials. Implementation of the plan is expected to enhance service delivery, particularly to the poor, while significantly reducing the environmental impact and energy consumption associated with waste disposal.

⁵ This excludes four technical assistance task orders that were issued and subsequently cancelled by USAID.

Increased Energy Efficiency in Government (Task Order 40 TA) – This GMAC activity is one of approximately 22 GMAC projects addressing climate change mitigation that have been implemented at the joint request of SO6 and the South African Department of Environmental Affairs and Tourism (DEAT). MTI worked with Khanya-Africa Business Solutions in the development of a draft strategy and procurement policy for improved energy efficiency in government facilities and operations, implementation of workshops for public officials for this purpose, and a public information campaign to highlight mitigation measures being undertaken to reduce energy consumption in the public sector.

Methane Reduction/Conversion Study (Task Order 42 TA) – At SO6's request and in partnership with the South African Cities Network, MTI subcontractor Palmer Development Group is investigating the potential for methane emission reductions in twelve South African municipalities. Methane is both a hazardous greenhouse gas that has been targeted for reduction under the Kyoto Protocol and also an energy source with productive uses. Furthermore, reductions in methane emissions offer municipalities the potential for new sources of revenues through trading of carbon credits. This study, which is generating considerable interest among national officials and the international donor community alike, has identified new opportunities for municipalities to address both environmental and energy targets while providing new income sources for municipalities under the emerging global emissions trading regime.

2.2.3 Trends and Issues

Key features of the GMAC technical assistance portfolio this year were:

- There has been a trend toward fewer but higher value technical assistance activities this year, largely as a result of changes in the programming priorities and GMAC fund obligation levels of SO6 and RUDO following staff turnover within those offices. The average value of new TA task orders received from USAID increased from \$83,916 during the previous annual reporting period to \$93,500 this year. However, the low number of new TA task orders received this year has contributed to a decreased rate of fund commitment and disbursement under this GMAC component.
- Continuing budgeting and financial management challenges have been posed by severe exchange rate fluctuations. To a significant extent, these have been addressed by working with USAID to establish realistic budgets for task ordered activities and by vigorously pursuing cost cutting measures in subcontract negotiations.

2.3 Grant Administration

2.3.1 Activities

Since the start of the contract, we have acted on a total of 41⁵ task orders for grants administration (GA) services with maximum authorized budgets totaling \$4.95 million and ranging in value individually from \$14,478 to \$250,000. We have awarded GMAC grants totaling \$4.75 million to date (or 96 percent of the maximum authorized task order budget amounts), of which \$3.13 million, or 66 percent of the MTI awarded amount, has been disbursed. All GA task orders received from USAID to date have been acted on by MTI and are at various stages of pre-award investigations, implementation, or closeout, as detailed in Attachment C.

All ongoing GMAC grants were identified and selected through the following mechanisms:

⁵ This excludes 5 other grants administration task orders that were issued and subsequently cancelled by USAID.

- 2 grants previously identified, but not funded, through the SO6 2000-2001 SO6 Annual Program Statement process.
- 4 grants from the SO6 2001-2002 Annual Program Statement issued in November 2001.
- 14 grants through an SO6 Request for Applications (RFA) entitled “Promotion of Sustainable Development and Climate Change” issued in December 2001.
- 3 grants through the SO6 2002-2003 Annual Program Statement issued in September 2002.
- 11 grants from the SO5 2003-2004 Annual Program Statement issued in February 2003.
- 7 grants identified through unsolicited proposals to SO6 and authorized for sole source acquisition by the USAID Contracts Office.

During the 2003-2004 annual reporting period, 28 GA task orders were active, including 13 newly received during the course of the year and 15 more long-term grants executed in previous years for which we had continuing management responsibilities. Disbursements for grants during this reporting period increased by 14 percent to \$1.11 million from the \$0.96 million recorded during the previous annual reporting period.

Technical monitoring of the programs undertaken by GMAC grantees is undertaken jointly by USAID and MTI. MTI, however, reviews all deliverables and approves disbursements. The timely submission of acceptable deliverables has been the key monitoring tool for MTI, supplemented with regular site visits and constant communication with grantees.

2.3.2 Technical Highlights

Noteworthy task ordered activities under the grants administration component this year have included:

World Education Ntinga (Task Order 33 GA) – At the micro-enterprise level in South Africa, lack of access to appropriate banking services is viewed, along with difficulties in obtaining credit, as a primary barrier to growth and job creation in rural areas. Given the lack of formal bank structures outside the main towns, rural businesses and residents bear high transaction costs – in terms of the time involved, travel expenses incurred, and bank fees paid – when they wish to make use of banking services. Under a pilot program based in Mpumalanga province entitled “Innovations in Rural Finance”, MTI has awarded a grant on behalf of SO5 to World Education Ntinga (WEN) in partnership with Beehive Financial Services, one of the few small business and financial services provider in the province, and Teba Bank, a registered, non-traditional banking institution with origins in the mining industry, to address this problem. The program is piloting, and then rolling out, a wide range of financial services to over 6,000 of Beehive’s small business clients and other historically disadvantaged residents through a debit card system from Teba Bank. World Education Ntinga is providing overall management, training, and mentoring support to Beehive to link its clients to the program as well as to identify, train, and mentor up to a dozen local merchants to be Debit Card Agents, providing point-of-service facilities for client access to debit card machines.

ComMark Trust (Task Order 42 GA) – In line with SO5’s employment creation strategy through improving market mechanisms, MTI was tasked with supporting the ComMark Trust in partnership with National Wool Growers’ Association to assist the development of African wool farmers in the Eastern Cape and Free State provinces. USAID funding, through a GMAC grant award of \$250,000, is leveraging an additional \$500,000 from the British DFID to support the development of market mechanisms and other measures directly related to the effective, long-term functioning of wool production and trading markets in rural areas to improve breeding, husbandry, health and nutrition, pasture management, physical infrastructure, and processing technology. The intended result of this initiative is the generation of higher incomes through the higher production of better quality and more marketable wool by emerging producers in rural areas. The program has the further ambitious goal of bringing 50 percent of the traditional farmers from the Eastern Cape into the emergent category, raising the number to at least 50,000 producers.

Wupperthal Women's Cooperative (Task Order 39 GA) – A good example of how SO5 is working with private businesses in South Africa to create employment for the rural poor is the Wupperthal Rooibos Soap Making program. The grantee, Afriplex, is a private sector company based in the Western Cape province that manufactures over 150 different products from extracts of African plants. Afriplex is not only an economic enterprise, but takes seriously its social responsibility to promote conservation while supporting the development of local communities. Through Afriplex, assistance is being channelled to a group of poor, rural women in the Western Cape to expand their production and marketing of natural soap products made with waste material from large-scale rooibos tea production in the area. The plan is to expand their existing markets with local guesthouses and seek distribution through specialty boutiques, regionally and nationally.

Cope Housing Association (Task Order 30 GA) – This SO6 grant project is demonstrating a model for environmentally sustainable inner city revitalization in the low-income Bertrams neighborhood of Johannesburg, an area that has been targeted for integrated development by the Johannesburg Metropolitan Council. While Bertrams is well situated, boasts some of the best international standard infrastructure for sports in the country, its largely low-income residents are also experiencing high levels of crime, illegal land occupation, and other social problems. The grant project has been successful in establishing a best practice model for inner city redevelopment in South Africa while demonstrating an integrated approach to addressing the needs of a previously disadvantaged community in a sustainable and responsible way. The project is contributing significantly to addressing the housing shortage in the Johannesburg inner city; supporting in a concrete way government objectives for social housing; accessing Council resources; and ensuring the payment of rates, taxes, electricity, and water accounts which will enhance the Council's ability to provide urban services to poorer communities.

Isandla Partners in Development (Task Order 28 GA) – IPD has been a valuable partner to SO6 since 2000. IPD's focus in this SO6-supported grant project is on the needs of the disabled and families affected by HIV/AIDS, which IPD has identified as being underserved by existing national, provincial, and municipal housing policies and programs. A key project objective and accomplishment has been to drive, through demonstration and outreach, the development and implementation of appropriate policies for housing for the disabled. As a result of IPD's efforts, a provincial policy to facilitate housing for the disabled is now in place in the Eastern Cape. Over 50 demonstration houses for the disabled have also been completed, and national housing subsidies for the development of 70 additional housing units for low-income families in the Soweto-on-Sea community have been obtained. The project also supports an outreach center for home-based care for community members suffering from HIV/AIDS.

Project Preparation Trust of KwaZulu-Natal (Task Order 29 GA) – This SO6-sponsored project provides a revolving fund facility that provides housing and care for orphans and other vulnerable children and supports local economic development benefiting the disadvantaged. To date PPT has successfully approved R36.5 million for subprojects benefiting 1,035 households. Feasibility studies are complete for seven subprojects, which include in situ upgrading of housing and infrastructure, micro-enterprise and food security development, HIV/AIDS relief through the establishment of 20 community care homes, and 12 foster care homes.

2.3.3 Trends and Issues

Key features of the GMAC grants administration portfolio this year were:

- There has been a trend toward higher value grants. The average value of individual new GMAC grants executed during the current reporting period was \$160,077, up from \$140,000 recorded last year. This has contributed positively to an increased rate of both fund commitment and disbursement under this GMAC component.

- The limitation imposed on the lifespan of individual grants by the relatively short GMAC contract period continues to be an issue of concern. We are now moving into the fourth year of the GMAC contract, and there is an urgent short-term need to identify and initiate in collaboration with USAID all grant activities to be undertaken through the present expiration of the contract in September 2005, or to extend the contract.
- An increased emphasis has been placed on the provision of assistance to grantees and USAID alike to ensure effective indicator tracking and data quality assessment under GMAC grant activities.
- We have placed considerable emphasis this year on strategies to alleviate the effects of exchange rate shifts by working with grantees to implement cost cutting measures and through agreements with USAID to anticipate a downward trend in the value of the Dollar in defining the maximum Dollar budgets of grants.

2.4 Training

2.4.1 Activities

Since contract inception, we have received a total of 31 task orders under the GMAC training (TR) component with maximum authorized budgets totaling \$886,125 and ranging in value individually from \$600 to \$227,000. Through 9/30/04, we have contracted \$609,693⁶ (or 69 percent of the of the maximum authorized TR task order budget amounts), of which \$596,813 (or 98 percent of the total contracted amount) has been disbursed. All TR task orders received from USAID to date have been acted on by MTI and are at various stages of development, implementation, or closeout, as detailed in Attachment C.

During the 2003-2004 annual reporting period 14 TR task orders were active, including 7 newly received during the course of the year, and work is continuing on 7 more long-term training activities initiated in the previous year. The average value of individual TR task orders received from USAID this year increased by 265 percent to \$41,200 from the \$15,548 recorded last year. In contrast, disbursements this year for TR activities declined from \$116,410 recorded last year to \$91,993. These decreases are associated with the increased share of low value and labor-intensive participant training activities in the TR portfolio this year.

2.4.2 Technical Highlights

Noteworthy task ordered activities under the GMAC training component this year have included:

Johannesburg Housing Company/Mercy Housing Staff Exchange (GMAC Task Order 29 TR) –The JHC is a non-governmental organization focusing on urban revitalization and private sector delivery of affordable housing in Johannesburg's inner city, an area that has witnessed a steep decline in business activity, employment, occupancy rates, property values, and tax base over the past decade. In 2003 and again in 2004, the JHC requested SO6 assistance through GMAC to facilitate staff exchanges with Mercy Housing, Inc., an internationally known organization operating in a similar urban context and with similar objectives in 13 US states. The JHC/Mercy staff exchanges have provided a useful opportunity for both organizations to share experiences, ideas, and programming strategies, which have proved beneficial to both organizations. Preparations are now underway for additional staff exchanges in January and March of 2005.

Micro-Enterprise Development Training (GMAC Task Order 30 TR) – This SO5-funded participant training activity sponsored the attendance of four South African micro-finance practitioners at a Micro-Enterprise and Development Certificate Course jointly sponsored by the Micro-Enterprise Development

⁶ A new training Task Order budgeted at \$200,000 was received from USAID on the final day of this reporting period and is in the process of being procured.

Institute of Southern New Hampshire University and South Africa's University of the North Graduate School of Leadership. The two-week course, which was attended by practitioners from a variety of African countries, focused on the transfer of technical and management skills needed to establish sustainable micro-finance institutions that understand and address the needs of the poor. Very positive feedback was received from the GMAC-funded participants regarding the usefulness of the course work and the opportunity provided to network and share experiences with other international participants involved in the micro-enterprise field.

2.4.3 Trends and Issues

Key concerns regarding the GMAC training portfolio this year were as follows:

- Commitment and disbursement rates for training have remained low as a result of the relatively low value and labor-intensive nature of most TR task orders issued to us by USAID this year. However, we did recently receive a new TR task order from SO6 for a large-scale subcontract involving municipal financial management capacity building, a core SO6 strategic concern and an activity with the potential for high impact within the South African developmental context.
- The minimum timeline required by USAID/Washington for processing participant training requests has sharply increased, and this change has affected our ability to address task ordered participant training requests on short notice. In order to ensure compliance with USAID requirements, meet the expectations of the USAID technical office, and be responsive to the trainees' needs, we have proposed regular joint planning sessions with our USAID technical office clients to assist with identification, selection, scheduling, and evaluation of participant training opportunities.

2.5 *Monitoring and Evaluation*

2.5.1 Activities

This GMAC program component has had the least number of activities. Since contract inception, we have received a total of 13 GMAC monitoring & evaluation (ME) task orders ranging in individual value from \$10,525 to \$80,000 and with maximum authorized budgets totaling \$541,863. We have contracted \$481,183 for ME subcontracts to date (or 88 percent of the maximum authorized task order amount), of which \$387,872 (or 71 percent of the contracted amount) has been disbursed. All ME task orders received to date have been acted on by MTI and are at various stages of implementation or closeout, as detailed in Attachment C.

During the current 2003-2004 annual reporting period, 9 ME task orders were active (two of which were multi-year subcontracts), including 5 new task orders received during the reporting period. Disbursements for ME this year reached \$216,159, which represents a 33 percent increase from the \$162,947 in disbursement recorded in the previous annual reporting period.

2.5.2 Technical Highlights

Noteworthy task ordered activities under the GMAC monitoring & evaluation component this year have included:

Urban Sector Network (USN) Grant Evaluation (Task order 11 M&E) – The USN is a national network of not-for-profit, non-governmental organizations that facilitate community-based housing and urban development initiatives benefiting South Africa's urban poor. SO6 supported a USN effort implemented during the 2002-2003 period to identify key needs, opportunities, and obstacles to hostel redevelopment in South Africa, including research into tenure options, delivery and management models, and design options based on three pilot hostel redevelopment activities in Cape Town;

community outreach and information campaigns; and policy submissions to Government to establish a more enabling environment for sustainable hostel redevelopment. The evaluation of this project by MTI subcontractor Bruce Boaden, a respected South African academic, found that the overall results of the grant project were very positive, but that the labor-intensive nature of the pilot hostel redevelopment projects implemented in Cape Town may have diverted resources, in part, from the core grant objectives of sector-level research.

SAIBL Program Outreach Workshops (Task Order 10 ME) – SO5’s South African International Business Linkages program provides training and technical assistance to small and medium scale, historically disadvantaged South African businesses to build capacity, secure production financing, and exploit new markets. The program also promotes linkages between the assisted businesses and more established local, regional, European, and US businesses for trade and skill transfer purposes. At SO5’s request in 2003, MTI subcontracted KNC and Associates to evaluate the SAIBL program, and they found the program to be one of the most effective of its kind in South Africa. Subsequently in 2004 KNC & Associates conducted a series of four-workshops to highlight the results of the program with key stakeholders in the donor, governmental, and private sectors.

2.5.3 Trends and Issues

GMAC Contract Modification No. 7 expanded the GMAC services to include responsibility for an array of performance monitoring and evaluation services to and for our USAID technical office clients. These included establishing performance indicators, monitoring progress towards the achievement of those indicators, and qualitative assessment of the data collected. This has led to an increase this year in the number of ME subcontracted activities as well as an expansion of performance monitoring services provided directly by the MTI field office staff.

3. Operations

3.1 General Administration

All office facilities, equipment, and systems are fully operational, and we do not anticipate major expenditures for this purpose for the balance of the contract period beyond repair and replacement on an as-needed basis of the used office equipment and furnishings provided by USAID at contract inception.

3.2 Personnel Management/Level of Effort (LOE)

Attachment A shows the level of effort (LOE) expended during the 2003-2004 annual reporting period as well as cumulative LOE expended to date since contract inception. This year has seen three key personnel changes: two individuals were recruited and hired, with USAID approval, to fill Projects Coordinator and Training/Projects Assistant positions in the MTI field office in 2004 and a field office Projects Manager resigned toward the end of the annual reporting period. Recruitment is now underway and we expect to fill the vacant position in late 2004.

3.3 Financial Management

Attachment B provides a summary of overall GMAC expenditures charged to USAID since the start of the contract. A total of \$9.90 million has been expended since contract inception at an average rate of \$275,000 per month for combined programming and operations. During the 2003-2004 annual reporting period, overall expenditures were \$3.56 million, or \$296,000 a month, which represents a slight decline from the \$3.90 million expended during the previous reporting period. The slight decline in disbursements is generally attributable to the lower level of obligated USAID funds, and this affected the amount of funds committed by USAID through GMAC task orders issued this year. Approximately

\$14.6 million has been obligated, of which \$9.9 million has been expended as of September 30, 2004, or approximately 68 percent of the obligated amount. As we now enter the fourth year of the GMAC contract, increased attention is being paid to the current balance of funds obligated into the GMAC contract and its adequacy for planned program and MTI operational activities through the current expiration date of the contract on September 30, 2005. At the current rate of disbursement, we anticipate there will be adequate funds to finance the contract beyond the current expiration date, and we are hopeful that USAID will exercise the option to further extend the contract.

3.4 *Liaison with USAID/Reporting*

Because of our role as a de facto administrative adjunct to USAID/South Africa offices and the broadly defined nature of the GMAC scope of work, close day-to-day communication and collaboration with USAID staff has been crucial to efficient implementation of our contract responsibilities. Since the early days of the contract, a monthly meeting of MTI field office staff, the GMAC CTO, and (when schedules allow) our USAID Regional Contracts Office representative has been held to discuss and address current programming and operational issues. A monthly issues memo prepared by the GMAC COP and a detailed task order tracking sheet is provided, which provides continuously updated information to USAID on the status of GMAC work. The MTI field office also works closely with our USAID technical office clients to provide reporting of accrued expenditures and grant project status on a quarterly basis; grant project data on a semi-annual basis; program-related performance monitoring data and data quality assessment on an annual basis; and annual reporting of foreign taxation, as required by GMAC contract modification number 9.

With our expanded contractual responsibility for performance monitoring and data quality assessment, as formalized through GMAC contract modification number 7, an additional dimension has been added to GMAC reporting activities. To ensure the correctness of reported performance data, the MTI field office has designed and implemented systems and procedures for data quality assurance consistent with USAID guidance. Elements include training grantees in performance monitoring and data collection, working with new grantees to develop data quality plans, reviewing grantee data quality systems, and ensuring that complete documentation relating to data collection, generation, and manipulation accompany all GMAC grantee data inputs for the USAID Annual Report. Considerable staff and consultant resources have been applied to these reporting and data quality activities, as well as the addition more recently of new USAID reporting requirements with regard to Presidential Initiatives.

3.5 *Contract Modifications*

The GMAC contract, as originally signed, was a \$9.36 million contract with an initial two-year base period and with options for an additional three years. Through 9/30/04, 11 modifications to the GMAC contract have been executed which have extended the contract period through September 30, 2005:

- Mod. 1 (Sept. 27, 2001) increased obligated USAID funding to \$3,567,698
- Mod. 2 (Nov. 28, 2001) increased the contract base period budget to \$9,807,000 and authorized VAT reimbursement by USAID under the contract
- Mod. 3 (June 12, 2002) extended the contract base period by one year to October 15, 2004, redefined and increased the base period level of effort, allowed a “buy-in” to the contract by the USAID/South Africa Private Enterprises Office (SO5), and clarified various contract provisions
- Mod. 4 (June 12, 2002) increased the base period level of effort from 201 to 280 person months, increased the base period budget to \$14,356,738, further clarified the contract scope of work, and corrected administrative errors in previous modifications
- Mod. 5 (July 16, 2002) increased obligated USAID funding to \$5,652,198.00
- Mod. 6 (Sept. 30, 2002) increased obligated USAID funding to \$9,910,288.69
- Mod. 7 (Sept. 30, 2003) amended the scope of work, budget, and LOE; extended the contract to 9/30/05; and increased the obligated funding to \$10,919,438.04

- Mod. 8 (Sept. 24, 2003) increased the obligated funding to \$13,869,830.04
- Mod. 9 (Oct. 28, 2003) added a Reporting of Foreign Taxes clause to the contract.
- Mod. 10 (July 29, 2004) increased the obligated USAID funding to \$14,161,153.04.
- Mod. 11 (Sept. 25, 2004) increased the obligated USAID funding to \$14,574,790.40.

4. Summary Issues and Recommendations

This annual report has examined activities, trends, issues, and opportunities associated with GMAC programming and operations in the past year. The following highlights key recommendations for action in future months:

GMAC Contract Timelines and Budgeting – As we now enter the fourth year of the contract, clarification is requested regarding USAID plans for exercising the option to extend the GMAC contract beyond the current expiration date of September 30, 2005. With the current expiration date, all current and future GMAC task ordered activities should be complete by July 2005 in order to accommodate GMAC closeout requirements.

Procurement Planning – We recommend short-range attention to collaborative work planning by USAID and MTI to identify and realistically schedule future GMAC requirements. More specifically, we recommend in-depth discussions between MTI staff and the USAID technical office clients to define and begin work on all task ordered activities planned for the balance of the GMAC contract so as to ensure that USAID program objectives can be met.

Performance Monitoring and Data Quality Assessment – USAID as a whole has placed increased emphasis on performance monitoring and more rigorous attention to data quality assessment, and the GMAC contract has been modified to increase our responsibilities in these respects. To ensure that the required data is collected, verified, and reported in time to meet the broad and fluid range of USAID requirements and schedules, we recommend detailed discussions with our USAID technical office clients early in the annual reporting cycle regarding any anticipated changes in PMP and partner reporting requirements.

Exchange Rate Shifts – Continuing shifts in the value of the Dollar against the Rand this year has posed severe financial management challenges for USAID, MTI, GMAC subcontractors, and GMAC grantees alike. Under procedures requested by USAID, GMAC task orders, subcontracts, and grant agreements provide not-to-exceed budgets defined in Dollars but disbursement schedules defined in Rands. As a result of this policy, shortfalls in planned Rand disbursements have occurred in several cases, resulting in considerable hardship for the organizations and individuals concerned. Accordingly, we recommend continued use of conservative exchange rates, which anticipate continued declines in the value of the Dollar against the Rand, in determining GMAC task order budgets.

Attachments

- A. LOE Tracking Sheet**
- B. Financial Data Sheet**
- C. Task Order Summary Sheet**

Attachment A: LOE Tracking Sheet¹

	Authorized LOE	Total Expended as of 9/30/04	Percent Used	Percent Unused
I. Long-Term Expatriates				
Chief of Party	45.13	31.49	70%	30%
Program Coordinator	36.16	22.04	61%	39%
Subtotal, Long-Term Expatriates	81.29	53.53	66%	34%
II. Long-Term Local Professionals				
Grants Manager	42.61	26.82	63%	37%
Projects Coordinator	43.02	28.93	67%	33%
Office Manager	44.48	31.54	71%	29%
Project Coordinator	30.00	6.37	21%	79%
Training/Project Assistant	29.00	5.18	18%	82%
Subtotal, Long-Term Local Professionals	189.11	98.84	52%	48%
III. Home Office Staff				
Program Manager	33.68	22.06	65%	35%
Program Asst.	4.41	4.41	100%	0%
Accountant	4.15	4.45	107%	-7%
Accountant	8.06	3.88	48%	52%
Administrative Support	2.64	0.12	4%	96%
Subtotal, Home Office Staff	52.94	34.91	66%	34%
IV. Short-Term Specialists				
Private Sector Specialist	15.13	7.76	51%	49%
Training Specialist	2.87	0.10	3%	97%
Contracts Specialist	4.73	1.46	31%	69%
Projects/M&E Specialist	7.75	0.00	0%	100%
Accounting Services	0.81	0.81	100%	0%
Subtotal, Short-Term Specialists	31.29	10.13	32%	68%
GRAND TOTAL	354.63	197.41	56%	44%

¹Based on actual direct labor charges.

GMAC Task Order Status: 9/30/04*

Task Order No.	USAID Budget Source	MTI/USAID Task Managers	Summary Description	Status	Original Task Order Budget	Amended Task Order Budget	MTI Committed Amount	MTI Disbursed Amount	MTI Undisbursed Balance
Technical Assistance									
1	SO6	BD/Ndlovu	Technical services to the RSA Department of Water Affairs and Forestry (DWAF) for an accreditation framework in the sanitation sector.	Closed Out	\$30,000	\$29,964	\$29,964	\$29,964	\$0
2	SO6	BD/Wines	Study of SO6 policy assistance for housing and municipal infrastructure.	Closed Out	\$6,800	\$3,562	\$3,562	\$3,562	\$0
3			Technical services to the RSA National Treasury for municipal debt monitoring.	Cancelled	\$12,000	\$0	\$0	\$0	\$0
4	SO6	BD/Wines	Technical services to SO6 for financial sector monitoring and evaluation.	Closed Out	\$7,000	\$5,733	\$5,733	\$5,733	\$0
5				Cancelled					
6	SO6	BD/Wines	Municipal financial assessment services to three RSA cities.	Closed Out	\$170,000	\$134,115	\$134,115	\$134,115	\$0
7	SO6	SH/Wines	Design of technical assistance program for housing and related services for the City of Tshwane.	Closed Out	\$25,000	\$3,066	\$3,066	\$3,066	\$0
8	RUDO	BD/Glenn	Technical and commodity support services to the Alliance of Mayors Initiative to Address AIDS at the Local Level (AMICAALL) Program Secretariat in Windhoek, Namibia.	Completed	\$36,000	\$36,000	\$35,018	\$34,018	\$1,000
9	SO6	BD/Wines	Ongoing financial viability analysis services to SO6 for Development Credit Authority (DCA) programming.	Closed Out	\$10,000	\$500	\$500	\$500	\$0
10	SO6	SH/Wines	Planning, engineering, and financial advisory services to the Alexandra Township Urban Renewal Project.	Closed Out	\$100,000	\$99,000	\$99,000	\$99,000	\$0
11	SO6	BD/Wines	Urban design advisory services to the Johannesburg Housing Company's Brickfields housing projects.	Closed Out	\$25,000	\$24,937	\$24,937	\$24,937	\$0
12	SO6	BD/Wines	Organizational development services for the establishment of the South African Cities Network (SACN).	Closed Out	\$10,000	\$9,970	\$9,970	\$9,970	\$0
13	RUDO	BD/Glenn	Development of an economic development strategy for the city of Kigali, Rwanda.	Closed Out	\$10,000	\$9,960	\$9,960	\$9,960	\$0
14	SO6	BD/Wines	Organizational and business planning services to the Institute for Local Government Management (ILGM).	Closed Out	\$65,000	\$61,457	\$61,457	\$61,457	\$0
15	RUDO	BD/Glenn	Technical assistance to USAID/Rwanda for the design of a pilot health/local government project.	Closed Out	\$17,000	\$11,595	\$11,595	\$11,595	\$0
16	DEAT	SH/Knight	Support to the University of Cape Town for implementation of its Khayelitsha Eco-Action Partnership Programme.	Closed Out	\$65,000	\$61,000	\$61,000	\$61,000	\$0
17	DEAT	SH/Wines	Support to the Technikon Northern Gauteng for implementation of solar power demonstration project.	Closed Out	\$38,000	\$38,000	\$38,000	\$38,000	\$0
18	DEAT	SH/Wines	Implementation of Cape Technikon demonstration project for solar sewing machine technology in reducing GHGs.	Closed Out	\$49,000	\$50,315	\$50,315	\$50,315	\$0
19	SO6	BD/Wines	Technical services to SO6 in the design of a metro-cities support program strategy.	Closed Out	\$16,000	\$5,079	\$5,079	\$5,079	\$0
20	DEAT	BD/Wines	Publication of the RSA Initial Communication on Climate Change as part of the World Summit for Sustainable Development.	Closed Out	\$50,000	\$1,667	\$1,667	\$1,667	\$0
21	SO6	BD/Ndlovu	Technical services for the packaging of a USAID Development Credit Authority (DCA) loan.	Closed Out	\$16,000	\$16,101	\$16,101	\$16,101	\$0
22	SO6	BD/Wines	Comparative study of niche lending approaches relevant to the RSA low income	Closed Out	\$800	\$779	\$779	\$779	\$0

* Disbursement amounts shown are VAT-inclusive.

Task Order No.	USAID Budget Source	MTI/USAID Task Managers	Summary Description	Status	Original Task Order Budget	Amended Task Order Budget	MTI Committed Amount	MTI Disbursed Amount	MTI Undisbursed Balance
			household market.						
23	RUDO	SH,FB/Glenn	Development of an economic development strategy for the city of Livingstone, Zambia.	Closed Out	\$50,000	\$49,993	\$49,993	\$49,993	\$0
24	SO6	BD/Wines	Technical services to AMICAALL for the design of municipal-level HIV/AIDs program in RSA.	Closed Out	\$16,000	\$14,012	\$14,012	\$14,012	\$0
25				Cancelled					
26	SO6	BD/Wines	Study of options for shared ownership of low-cost housing in RSA.	Closed Out	\$10,000	\$12,472	\$12,472	\$12,472	\$0
27	SO6	FB/Wines	Phase II organizational development services for the establishment of the South African Cities Network (SACN).	Closed Out	\$35,000	\$34,331	\$34,331	\$34,331	\$0
28	DPLG	SH,FB/Ndlovu	Technical services for eThekwin floodline and catchment study.	Closed Out	\$150,000	\$123,942	\$123,942	\$123,942	\$0
29	GMAC STS	SH/Lawrence	Ongoing technical advisory services to SO5, as funded under the GMAC operational budget.	Implementation	\$0	\$0	\$0	\$0	\$0
30	SO6	SH/Ndlovu	Technical services for the development of a Tshwane waste management community awareness plan.	Implementation	\$50,000	\$50,000	\$26,000	\$26,000	\$0
31	SO6	BD/Wines	Phase II urban design advisory services to the Johannesburg Housing Company's Brickfields housing projects.	Closed Out	\$15,000	\$14,880	\$14,880	\$14,880	\$0
32	SO6	SH/Wines	Technical services to the City of Cape Town for the establishment of business units.	Closed Out	\$150,000	\$220,640	\$220,640	\$220,640	\$0
33	SO6	SH/Ndlovu	Technical services to facilitate a nationwide series of 14 workshops on behalf of the RSA Dept. of Housing.	Closed Out	\$36,000	\$77,583	\$77,583	\$77,583	\$0
34	SO6	BD/Ndlovu	Logistical services to facilitate a nationwide series of 14 workshops on behalf of the RSA Dept. of Housing.	Closed Out	\$100,000	\$76,569	\$76,569	\$76,569	\$0
35	SO6	SH/Ndlovu	Technical services for a water loss study within the Sol Plaatje municipal area.	Closed Out	\$30,000	\$24,859	\$24,859	\$24,859	\$0
36	SO6	BD/Wines	Technical services for a pilot municipal financial assessment for planning service delivery for Tshwane and Mogale municipalities.	Closed Out	\$50,000	\$141,230	\$141,230	\$141,230	\$0
37	SO6	SH/Ndlovu	Development of an integrated waste management plan for the City of Cape Town.	Implementation	\$300,000	\$250,000	\$250,000	\$227,821	\$22,179
38	SO6	BD/Ndlovu	Design of a RSA local government support program to address HIV/AIDS.	Closed Out	\$7,000	\$9,257	\$9,257	\$9,257	\$0
39	SO6	SH/Ndlovu	Technical support for the databasing of cadastral information in the City of Tshwane's Geographic Information System (GIS).	Closed Out	\$45,000	\$57,546	\$57,546	\$57,546	\$0
40	DEAT	BD/Knight	Technical services to the RSA Department of Environmental Affairs and Tourism to support improved energy efficiency in Government facilities, equipment and services.	Closed Out	\$211,000	\$112,151	\$112,151	\$112,151	\$0
41	SO6	SH/Knight	Procurement of technical services for a water loss study within the Buffalo City municipal area.	Closed Out	\$65,000	\$0	\$0	\$0	\$0
42	SO6	SH/Ndlovu	Technical services to the South African Cities Network (SACN) for a study of opportunities for methane conversion/carbon emission reduction by RSA cities.	Implementation	\$62,000	\$62,000	\$58,000	\$18,808	\$39,192
43	SO6/DoH	BD/Ndlovu	Management and technical services to RSA Dept. of Housing for the development of a new housing policy and research agenda.	Closed Out	\$180,000	\$168,281	\$168,281	\$168,281	\$0
44	RUDO	BD/Wines	Technical services to identify strategies for completion of USAID/Zimbabwe's Zimbabwe Private Sector Housing Programme.	Closed Out	\$4,500	\$5,370	\$5,370	\$5,370	\$0
45	DoF	SH/Ndlovu	Technical services to develop and implement computer software enhancements to National Treasury's Local Government Monitoring Database.	Implementation	\$125,000	\$125,000	\$125,000	\$82,779	\$42,221
46	SO5 & RUDO	SH/Glenn, Lawrence	Financial viability analysis services to SO5 and RUDO for Development Credit Authority (DCA) programming.	Implementation	\$12,000	\$37,000	\$25,578	\$24,947	\$631
47	SO6	SH/Ndlovu	Technical services to develop the human resources component of a water demand management strategy for Buffalo City municipality.	Cancelled	\$15,000	\$0	\$0	\$0	\$0

Task Order No.	USAID Budget Source	MTI/USAID Task Managers	Summary Description	Status	Original Task Order Budget	Amended Task Order Budget	MTI Committed Amount	MTI Disbursed Amount	MTI Undisbursed Balance
48	SO6	BD,SH/Ndlovu	Technical services to the RSA Municipal Infrastructure Investment Unit (MIU) to support the identification, development, packaging, and approval of municipal services loans qualifying for USAID Development Credit Authority (DCA) guarantees.	Implementation	\$150,000	\$150,000	\$150,000	\$8,801	\$141,199
Subtotal - Technical Assistance					\$2,627,100	\$2,419,916	\$2,379,512	\$2,133,090	\$246,422
Grants									
1	SO6	SH,NM/Ndlovu	Afesis-Corplan demonstration project for eco-operative housing for low income households.	Completed	\$160,000	\$155,000	\$155,000	\$155,000	\$0
2				Cancelled					
3	SO6	SH,NM/Ndlovu	Consortium for Urban Transformation Burgers Park Village project, a demonstration project for environmentally sustainable inner city housing.	Completed	\$100,000	\$112,700	\$112,700	\$112,700	\$0
4	SO6	SH,NM/Ndlovu	Food and Trees for Africa's Trees for Homes project, a greening program for low income urban neighborhoods.	Implementation	\$150,000	\$200,000	\$200,000	\$184,525	\$15,475
5	SO6	SH,NM/Ndlovu	Implementation of Aids Consortium program for HIV/AIDS assistance in low income neighborhoods.	Closed Out	\$100,000	108,634	\$108,634	\$108,634	\$0
6	SO6	SH,NM/Ndlovu	Ocean View Development Trust credit program for low cost housing.	Completed	\$79,742	\$100,742	\$100,742	\$100,742	\$0
7	SO6	SH,NM/Ndlovu	Implementation of five low cost housing projects by the Development Action Group (DAG) in Cape Town.	Closed Out	\$170,000	\$170,000	\$170,000	\$170,000	\$0
8	SO6	SH,NM/Ndlovu	Habitat for Humanity low cost housing project in KwaZulu-Natal.	Closed Out	\$25,000	\$25,847	\$25,847	\$25,847	\$0
9	DEAT	SH,NM/Knight	Midrand EcoCity Trust Ivory Park eco-village, a mixed use low income community development project.	Closed Out	\$44,000	\$50,616	\$50,616	\$50,616	\$0
10	DEAT	SH,NM/Knight	Parallax Sustainable Development Solutions (Pty) Ltd. demonstration project for rural energization that meets basic household electrical and thermal needs with reduced impact on climate change.	Completed	\$172,000	\$218,801	\$218,801	\$218,801	\$0
11				Cancelled					
12	DEAT	SH,NM/Knight	Soweto Development Foundation urban greening project.	Completed	\$111,300	\$111,300	\$111,300	\$111,261	\$39
13	DEAT	SH,NM/Knight	Lynedoch Development Foundation project for eco-village development in the Stellenbosch area.	Completed	\$58,000	\$65,751	\$65,751	\$63,459	\$2,292
14	DEAT	SH,NM/Knight	Agama Energy (Pty) Ltd. project to provide "green" energy to the 2002 World Summit on Sustainable Development in Johannesburg.	Completed	\$91,000	\$93,409	\$93,409	\$93,409	\$0
15	DEAT	SH,NM/Knight	Ndiswe demonstration project for a farm-scale ethanol production plant.	Closed Out	\$87,000	\$91,134	\$91,134	\$91,134	\$0
16				Cancelled					
17				Cancelled					
18	DEAT	SH,NM/Knight	Institute of Natural Resources for implementation of mangrove conservation and employment project in the Mngazana Estuary area of the Eastern Cape.	Implementation	\$87,000	\$87,000	\$87,000	\$55,400	\$31,600
19	DEAT	SH,NM/Knight	International Institute for Energy Conservation (IIEC-Africa) project to identify and implement sustainable transport options in consultation with local governments.	Completed	\$44,000	\$52,000	\$52,000	\$52,000	\$0
20	DEAT	SH,NM/Knight	Kranspoort Development Trust Land Restitution, Preservation, and Sustenance Project.	Implementation	\$42,000	\$42,000	\$42,000	\$21,960	\$20,040
21				Cancelled					
22	DEAT	SH,NM/Knight	Nuon RAPS Utility (Pty) Ltd.demonstration project for solar electrification in rural KwaZulu-Natal.	Completed	\$44,000	\$44,000	\$44,000	\$44,000	\$0

Task Order No.	USAID Budget Source	MTI/USAID Task Managers	Summary Description	Status	Original Task Order Budget	Amended Task Order Budget	MTI Committed Amount	MTI Disbursed Amount	MTI Undisbursed Balance
23	DEAT	SH,NM/Knight	Implementation of Ndlandlamuka community-based natural resource management demonstration project in a rural area of Northern Province.	Closed Out	\$87,000	\$90,948	\$90,948	\$90,948	\$0
24	DEAT	SH,NM/Knight	Implementation of Enerwise Africa demonstration project for monitoring & targeting systems to deliver sustainable energy savings to RSA industrial companies.	Completed	\$38,000	\$38,000	\$38,000	\$38,000	\$0
25	DEAT	SH,NM/Ndlovu	Implementation of ZET Consultancy demonstration project for environmentally sustainable energy source based on dug and recycled waste.	Closed Out	\$14,000	\$14,478	\$14,478	\$14,478	\$0
26	DEAT	SH,NM/Knight	Implementation of the Buffalo Flats Community Development Trust sustainable housing development and climate change mitigation demonstration project.	Completed	\$59,000	\$69,000	\$69,000	\$69,000	\$0
27	SO6	SH,NM/Glenn	Support for capacity building of the South African Cities Network, a new network of the nine largest cities in RSA.	Implementation	\$250,000	\$250,000	\$250,000	\$242,329	\$7,671
28	SO6	SH,NM/Ndlovu	Islandla Partners in Development pilot housing projects focused on low income disabled persons and families qualifying for housing subsidies.	Implementation	\$100,000	\$122,947	\$122,947	\$97,044	\$25,903
29	SO6	SH,NM/Ndlovu	Implementation of Project Preparation Trust projects in KwaZulu-Natal for shelter and care assistance to orphans and other vulnerable children and local economic development.	Implementation	\$120,000	\$165,798	\$165,798	\$83,739	\$82,059
30	SO6	SH,NM/Ndlovu	Cope Housing Association demonstration project for environmentally sustainable inner city upgrading and revitalization in the Bertrams neighborhood of Johannesburg.	Implementation	\$190,000	\$209,780	\$209,780	\$203,755	\$6,025
31	RUDO	SH,NM/Glenn	Assistance to AMICAALL programming in Namibia to strengthen local government responses to the impacts of HIV/AIDS at the community level.	Implementation	\$30,000	\$30,000	\$30,000	\$23,380	\$6,620
32	SO6	SH,NM/Glenn	Assistance for capacity building within the Institute for Local Government Management (ILGM), a membership-based national organization of RSA local government officials.	Implementation	\$150,000	\$150,000	\$150,000	\$40,962	\$109,038
33	SO5	SH,NM/Mamba	World Education Ntinga project for financial services to small, medium, and micro enterprises headed by historically disadvantaged individuals in RSA rural areas.	Implementation	\$250,000	\$250,000	\$250,000	\$32,488	\$217,512
34	SO5	SH,NM/Lucas	Afriplex biotechnology project benefiting small-scale RSA farmers.	Implementation	\$125,000	\$125,000	\$125,000	\$32,800	\$92,200
35	SO5	SH,NM/Lucas	AfricaBio project for biotechnology outreach, capacity building, and information transfer in RSA.	Implementation	\$250,000	\$250,000	\$250,000	\$191,049	\$58,951
36	SO5	SH,NM/Lucas	AfricaBio project for biotechnology outreach, capacity building, and information transfer in the Southern Africa region.	Implementation	\$100,000	\$100,000	\$100,000	\$85,863	\$14,137
37	SO5	SH,NM/Lucas	AfricaBio project for biotechnology outreach, capacity building, and information transfer in Zambia.	Implementation	\$100,000	\$100,000	\$100,000	\$87,365	\$12,635
38	SO5	SH,NM/Lucas	R.C. Krecek project to identify indigenous plants with medicinal qualities and assist emerging farmers to grow and market them.	Implementation	\$184,000	\$184,000	\$184,000	\$83,215	\$100,785
39	SO5	SH,NM/Lucas	Afriplex project for production of rooibos soap by low-income women in the Wupperthal rural area of the Western Cape.	Implementation	\$41,000	\$41,000	\$41,000	\$18,773	\$22,227
40	SO6	SH,NM/Ndlovu	Implementation of International Institute for Energy Conservation (IIEC-Africa) project to provide market support and capacity building assistance to promote use of liquid petroleum gas as an energy source in low income RSA communities.	Implementation	\$100,000	\$100,000	\$100,000	\$0	\$100,000
41				Cancelled					
42	SO5	SH,NM/Mamba	ComMark Trust project for improved production and capacity building among wool farmers of the Eastern Cape and Free State.	Implementation	\$250,000	\$250,000	\$250,000	\$18,907	\$231,093
43	SO5	SH,NM/Mamba	Cooperative Housing Foundation-South Africa project to facilitate delivery of business development services to emerging small, medium and micro enterprises in the Mdantsane area of the Eastern Cape.	Implementation	\$155,000	\$155,000	\$155,000	\$14,626	\$140,374
44	SO5	SH,NM/Mamba	South Africa Business Coalition on HIV/AIDS (SABCOHA) capacity building project to mitigate the economic impact of HIV/AIDS on RSA small, medium, and	Implementation	\$250,000	\$250,000	\$250,000	\$0	\$250,000

Task Order No.	USAID Budget Source	MTI/USAID Task Managers	Summary Description	Status	Original Task Order Budget	Amended Task Order Budget	MTI Committed Amount	MTI Disbursed Amount	MTI Undisbursed Balance
			micro enterprises.						
45	SO5	SH,NM/Mamba	BEES Trust capacity building project for small, medium, and micro enterprises in the garment industry of inner city Johannesburg.	Implementation	\$76,000	\$76,000	\$76,000	\$0	\$76,000
46	SO6	SH,NM/Ndlovu	Youth Development Trust (YDT) employment and skills training project for implementation in Buffalo City and Tshwane.	Preaward	\$200,000	\$200,000	\$0	\$0	\$0
			Subtotal - Grants		\$4,684,042	\$4,950,885	\$4,750,885	\$3,128,209	\$1,622,676
Training									
1	SO6	BD,NN/Ndlovu	Attendance of E. Nkem-Abonta at Harvard course on public sector financial management.	Closed Out	\$16,000	\$14,985	\$14,985	\$14,985	\$0
2	RUDO	BD,NN/Glenn	Invitational travel associated with African Union for Housing Finance annual conference.	Closed Out	\$3,500	\$6,000	\$6,000	\$6,000	\$0
3	SO6	BD,NN/Ndlovu	Design and implementation of University of the Witwatersrand training program in housing finance in conjunction with the University of Pennsylvania.	Completed	\$160,000	\$150,000	\$140,323	\$140,323	\$0
4	DEAT	SH,NN/Wines	Implementation of University of Stellenbosch training program for climate change research and capacity building.	Completed	\$227,000	\$227,000	\$227,000	\$227,000	\$0
5	RUDO	BD,NN/Glenn	Attendance of M. Shipanga at Georgetown University Leadership Seminar.	Closed Out	\$5,000	\$5,000	\$5,000	\$5,000	\$0
6	SO6	BD/Wines	Invitational travel associated with University of Witwatersrand/New York University joint research project on housing costs.	Closed Out	\$5,000	\$4,618	\$4,618	\$4,618	\$0
7	SO6	BD,NN/Wines	Attendance of TV Pillay at Government Finance Officers Association (GFOA) annual conference in Denver.	Closed Out	\$500	\$380	\$380	\$380	\$0
8	SO6	BD,NN/Wines	Attendance of three RSA municipal officials at Georgia State University fiscal policy training courses.	Closed Out	\$25,000	\$20,860	\$20,860	\$20,860	\$0
9	DoF	BD,NN/Wines	Attendance of M. Ndimande at Georgia State University course on fiscal decentralization.	Closed Out	\$15,000	\$10,862	\$10,862	\$10,862	\$0
10	SO6	BD,NN/Ndlovu	Participant training of T Adler in housing finance.	Closed Out	\$3,000	\$3,085	\$3,085	\$3,085	\$0
11	SO6	BD,NN/Ndlovu	Logistical arrangements for Institute of Housing SA workshop on housing and HIV/AIDS.	Completed	\$1,000	\$920	\$920	\$920	\$0
12	SO6	BD,NN/Wines	Participant training of C. Glover in banking sector development.	Closed Out	\$1,200	\$288	\$288	\$288	\$0
13	SO6	BD,NN/Ndlovu	Attendance of P. Molefe at University of Pretoria course on empowering communities for a sustainable future.	Closed Out	\$600	\$437	\$437	\$437	\$0
14	SO6	BD,NN/Ndlovu	Logistical arrangements for GMAC grantee workshop on USAID indicator tracking.	Closed Out	\$7,000	\$7,005	\$7,005	\$7,005	\$0
15	SO5	BD,NN/Lawrence	Logistical arrangements for workshop on USAID's Development Credit Authority (DCA) program.	Closed Out	\$1,000	\$738	\$738	\$738	\$0
16	SO6	BD/Ndlovu	Presentation of paper on international municipal economic development strategies at South African Cities Network (SACN) conference.	Closed Out	\$8,500	\$9,673	\$9,673	\$9,673	\$0
17	SO6	NN/Knight	Attendance of 11 RSA municipal officials at Bogota transportation conference.	Completed	\$56,000	\$56,000	\$35,545	\$32,571	\$2,974
18	SO6	BD/Ndlovu	Implementation of Durban waste management education program.	Closed Out	\$25,000	\$39,954	\$39,954	\$39,954	\$0
19	SO6	BD,NN/Wines	Attendance of N. Mjoli-Mncube at the Global Summit of Women.	Closed Out	\$5,000	\$3,140	\$3,140	\$3,140	\$0
20	SO6	BD/Ndlovu	Implementation of exchange program between the Johannesburg Housing Company and Mercy Housing Inc.	Closed Out	\$17,000	\$16,967	\$16,967	\$16,967	\$0
21	DPLG	BD/Ndlovu	Logistical arrangements for a Local Agenda 21 workshop in Pretoria.	Closed Out	\$20,000	\$14,750	\$14,750	\$14,750	\$0
22	SO5	BD/Mamba	Presentation of two papers at a conference of the University of Stellenbosch Africa Center for Investment Analysis.	Closed Out	\$4,850	\$1,276	\$1,276	\$1,276	\$0

Task Order No.	USAID Budget Source	MTI/USAID Task Managers	Summary Description	Status	Original Task Order Budget	Amended Task Order Budget	MTI Committed Amount	MTI Disbursed Amount	MTI Undisbursed Balance
23	DEAT	BD,NN/Knight	Attendance of L. Tyani at Safety, Health, and Environmental Business Administration course in Pretoria.	Closed Out	\$1,200	\$884	\$884	\$884	\$0
24	DEAT	BD/Knight	Attendance of S. Tyatya at Green Procurement workshop in Beijing, China.	Closed Out	\$5,000	\$2,900	\$2,900	\$2,900	\$0
25	SO6	BD/Ndlovu	Attendance of five participants at Institute for Housing SA annual conference in Rustenburg, RSA.	Closed Out	\$4,615	\$3,836	\$3,836	\$3,836	\$0
26	SO6	BD,NN/Ndlovu	Presentation of paper on rural employment and housing at the RSA National Rural Housing Symposium in Johannesburg.	Implementation	\$4,500	\$4,500	\$4,007	\$4,007	\$0
27	SO5	SH,NN/Lucas	Attendance of 5 RSA officials at USDA/APHIS conference on risk analysis in Addis Ababa, Ethiopia.	Implementation	\$15,000	\$15,000	\$14,893	\$9,305	\$5,588
28	SO6	BD,NN/Ndlovu	Attendance of N. Mjoli-Mncube at the Global Summit of Women.	Closed Out	\$5,000	\$3,866	\$3,866	\$3,866	\$0
29	SO6	BD,NN/Ndlovu	Phase 2 implementation of exchange program between the Johannesburg Housing Company and Mercy Housing Inc.	Procurement	\$40,000	\$40,000	\$0	\$0	\$0
30	SO5	SH,NN/Ndlovu	Attendance of 4 RSA officials at University of the North/Southern New Hampshire University micro-enterprise development course in Polokwane.	Implementation	\$21,200	\$21,200	\$15,500	\$14,375	\$1,125
31	DoF	SH/Ndlovu	Implementation of nationwide training program in municipal finance for local government officials.	Procurement	\$200,000	\$200,000	\$0	\$0	\$0
			Subtotal - Training		\$903,665	\$886,125	\$609,693	\$600,007	\$9,686
Monitoring and Evaluation									
1		SH/Ndlovu,Wines	Ongoing monitoring and evaluation services to USAID.	Implementation	\$30,000	\$36,460	\$16,020	\$15,229	\$791
2	SO6	SH/Wines, Lawrence	Ongoing credit program monitoring services to USAID.	Implementation	\$90,000	\$85,800	\$60,762	\$34,628	\$26,135
3	DWAF	BD/Ndlovu	Mid-term evaluation of SO6 Bushbuckridge Retail Water Distribution Project.	Closed Out	\$30,000	\$23,544	\$23,544	\$23,544	\$0
4	SO6	BD/Wines	Evaluation of SO6 policy progress in housing and municipal finance.	Closed Out	\$20,000	\$16,039	\$16,039	\$16,039	\$0
5	SO5	JRK,SH/Lawrence	Data quality assessment of SO5 partner organizations.	Closed Out	\$50,000	\$77,069	\$77,069	\$77,069	\$0
6	SO5	JRK,SH/Lawrence	Evaluation of SO5 Growth Equity, and Redistribution Privatization (GEAR) Project.	Closed Out	\$15,000	\$10,526	\$10,526	\$10,526	\$0
7	SO5	JRK,SH/Mamba	Evaluation of SO5 South African International Business Linkages (SAIBL) Project.	Closed Out	\$60,000	\$42,480	\$42,480	\$42,480	\$0
8	SO6	SH/Knight	Data quality assessment of SO6 partner organizations.	Closed Out	\$78,000	\$72,000	\$72,000	\$72,000	\$0
9	SO6	SH/Ndlovu	Evaluation of SO6-supported Cape Town Business Units Program.	Closed Out	\$75,000	\$80,000	\$80,000	\$80,000	\$0
10	SO5	SH/Mamba	Workshop presentation of SAIBL Project Evaluation findings.	Implementation	\$40,000	\$40,000	\$34,799	\$34,799	\$0
11	SO6	BD,TH/Ndlovu	Final evaluation of SO6 Urban Sector Network grant project.	Closed Out	\$30,000	\$14,944	\$14,944	\$14,944	\$0
12	SO5	BD/Lawrence	Phase 2 data quality assessment of SO5 partner organizations.	Implementation	\$5,750	\$13,000	\$13,000	\$8,172	\$4,828
13	SO6	TH,BD/Ndlovu	Final evaluation of SO6 Social Housing Foundation grant project.	Implementation	\$30,000	\$30,000	\$20,000	\$0	\$20,000
			Subtotal - Monitoring and Evaluation		\$553,750	\$541,863	\$481,183	\$429,430	\$51,754
CONTRACT GRAND TOTALS					\$8,768,557	\$8,798,789	\$8,221,273	\$6,290,735	\$1,930,538